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## R&I's 1987 MENU CENSUS: GROWTH LEADERS

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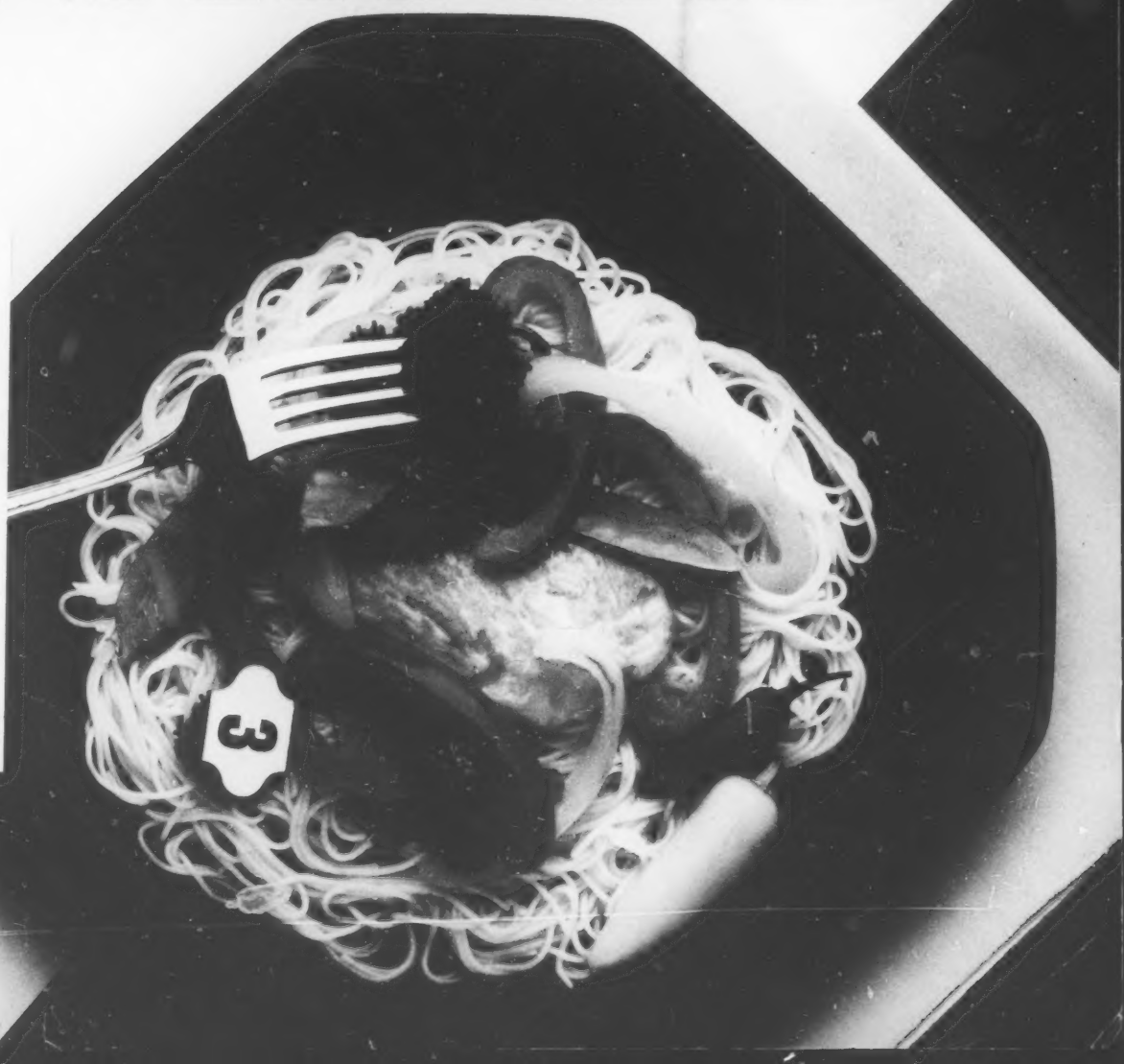
FEBRUARY 18, 1987

A Cahners publication serving the total foodservice industry

# RESTAURANTS & INSTITUTIONS



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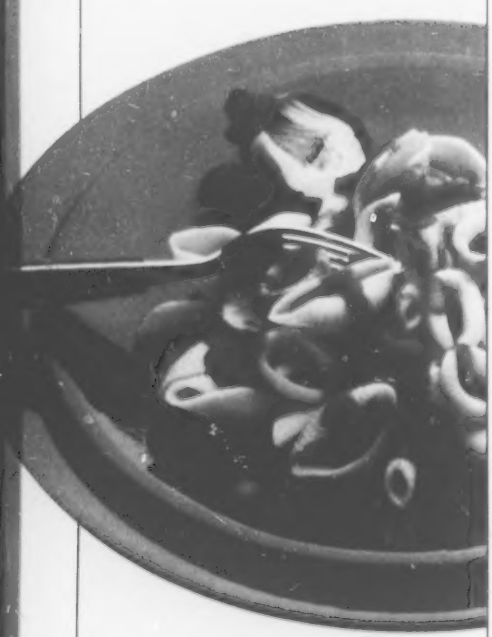


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■ ECONOMIC EXPERTS

# Regional Growth Varies Widely

## Employment, earnings gains needed to encourage spending.

**Kim Kennedy is a member of Cahners Department of Economics.**

Last year's economic growth was not evenly distributed across the regions of the country. Some areas prospered while others lagged behind. These differences are expected to continue and will have a major impact on the growth and profits of local foodservice establishments.

On the whole, the strongest regions of the country have been New England, the Middle Atlantic, the South Atlantic, and the Pacific Southwest. These regions are characterized by a diverse industrial mix that has created strong employment and earnings gains.

Job creation primarily has been concentrated on the two coasts. The hottest job growth during 1986 occurred in the South Atlantic, where employment grew an estimated 3% above 1985. Florida led the region's growth with a 3.7% increase.

The east South Central region (Kentucky, Tennessee, Alabama and Mississippi) ran a close second with a 2.4% gain in jobs. Growth in this region was aided, in part, by recent investment in auto production facilities.

The Northeast was the clear leader in consumer spending growth last year. This region's growth has come more from gains in personal income than from strong employment growth. In New England, total retail sales were up 11.2% from 1985 and in the Middle Atlantic, they were 8.3% higher.

Sales growth took quite a different trend at restaurants and bars, however. The region with the strongest growth in eating and drinking place sales was the Midwest, where sales were a whopping 12.6% higher than in 1985.

Part of the reason for the strong sales growth in this region was its depressed level of sales prior to 1986. But more importantly, this growth is evidence of an economic revival slowly beginning to occur in the Midwest.

Eating and drinking place sales also were up strongly in the South. Sales grew a healthy 8.4% in this region, encouraged by employment growth.

Growth across regions will converge somewhat during 1987, but for the most part, more of the same can be expected. Look for a diversifying economy and movement away from reliance on energy and farm economies as precursors of improvements in a region's economic performance.

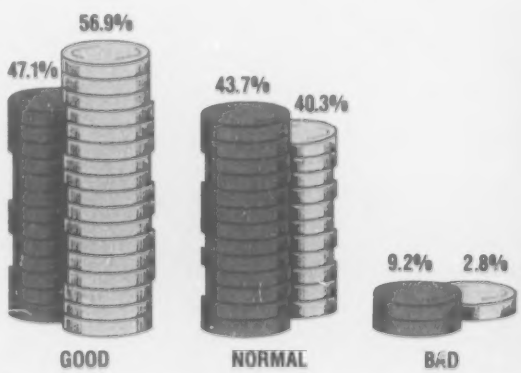
*—Kim Kennedy*

■ R&I DATA

### SALES NOW: FAST FOOD RATES BEST

**The number of operators reporting good sales in December dropped nearly 8 percentage points, but the number reporting bad sales also declined 5.5 points. While more than 15% of fast-food operators reported bad sales in November, not one reported poor sales in December. On the institutional side, only health-care operators showed any sign of declining sales. Employee feeding made strong strides, with 68.8% citing good sales.**

■ Commercial ■ Institutional




**REGIONAL GROWTH PATTERNS**

**After a year of depressed restaurant sales, the Midwest showed the nation's strongest sign of a turnaround in 1986.**

**(% change from 1985)**

| | |
|---|---|
| Northeast | +2.0% |
| Midwest | +1.8 |
| South | +1.5 |
| West | +1.9 |
| U.S. total | +1.8 |

| | |
|---|---|
| Northeast | +9.2% |
| Midwest | +3.4 |
| South | +4.2 |
| West | +4.1 |
| U.S. total | +5.1 |

| | |
|---|---|
| Northeast | +4.8% |
| Midwest | +12.6 |
| South | +8.4 |
| West | +4.5 |
| U.S. total | +7.6 |

Sources: U.S. Department of Labor, U.S. Department of Commerce

1987 Restaurants & Institutions, a Cahners publication

# R&I EXCLUSIVE

FOOD TRENDS

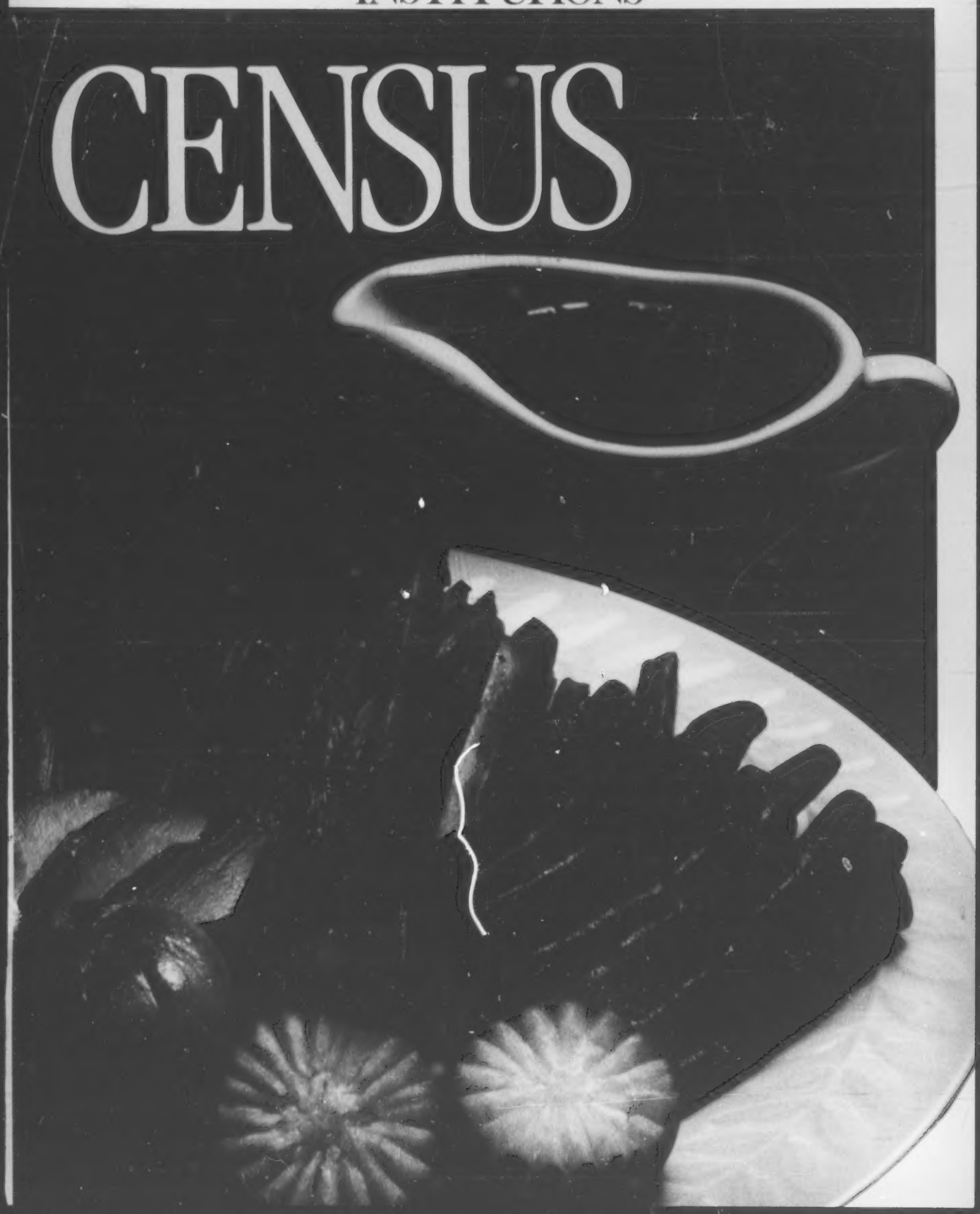
# 1987 MENU

**Restaurants & Institutions** *1987 Menu Census, the 17th since its inception in 1970, offers the most complete trend analysis available of best-selling menu items. It shows Americans still remain rooted in most of the traditional eating patterns but are embracing two major new currents — healthy eating and the continued assimilation of ethnic dishes into the mainstream. Among the top 50 items ranked, classics such as the cheeseburger, french fries, apple pie and tossed green salad are leaders. People are still eating a lot of beef; roast turkey beat out fried chicken for the first time; fish is regionally strong; and desserts continue to grow in popularity, as do pasta and spiced dishes. Variety is the biggest seller on any menu. The following facts and analyses should help operators find the right mix.*

*—Elizabeth Faulkner, Nancy Backas, Jeff Weinstein and Lisa Bertagnoli*

RESTAURANTS & INSTITUTIONS

# CENSUS



# 1987 MENU CENSUS

■ APPETIZERS

## Where Does the Meal Begin?

### A la carte menus and portion sizes make appetizers redundant.

Many more appetizers were taken off menus this year than were added. Of 25 appetizers *R&I* polled operators about, 18 showed negative growth; only four showed positive growth.

The good news in this shrinking menu section this year runs both hot and cold. Hot growth leader in the category is chicken wings, followed by chilled melon and salsa with chips. Of those listed as good sellers, the fastest-growing appetizer industrywide is melon.

Among the appetizers being taken off menus this year, thanks presumably to changes in fashion, price-value or availability are: sushi and sashimi, quesadillas, quiche, mousses, and pâtés and terrines.

**Tea for two; cocktails for 200:** Respondents with large catering operations still report strong appetizer sales and lengthy appetizer menus. Best selling appetizers reported by hotel operators include melon, chicken wings, breaded zucchini and shrimp cocktail. On the institutional side of the market, the catering menus' best-selling appetizer this year is melon, followed by chicken or seafood nuggets and nachos.

**Fruitful endeavors:** Temporarily out of fashion on appetizer menus, fruit appears to be making a comeback this year. After melon, the industrywide growth leader, grapefruit and fruit cup have made a strong showing especially in the West. Most likely to offer them are hospital and employee-dining operators.

**Seafood shines:** Perennial favorite shrimp cocktail is most popular in the Northeastern and Western states, with full-service restaurant operators most likely to offer it. Along with shrimp cocktail, clams and oysters appear on the menus of America most often, and are listed as good sellers most consistently by employee-dining operators.

**Golden nuggets:** Chicken and seafood nuggets are served as appetizers more often by institutional operators than by commercial. Especially popular in college operations and hospitals, nuggets do not show significant regional differences in popularity.

**Catering customers get raw deal:** Crudités graced many an appetizer table this year and were strong sellers particularly on the catering menus of health-care and B&I operations, particularly in the Midwest. Deep-fried, the same vegetables sell even better in the same segments and in the Southern states.

**10 BEST-SELLING APPETIZERS: NUGGETS WIN, HANDS DOWN**

Chicken and seafood nuggets, introduced by fast-food operations, have become favorite appetizers in both full-service restaurants and institutional settings.

| Total | Commercial | Institutional |
|---|---|---|
| Chicken/seafood nuggets | Nachos | Chicken/seafood nuggets |
| Melon | Chicken/seafood nuggets | Melon |
| Nachos | Melon | Nachos |
| Fruit cup | Shrimp cocktail | Fruit cup |
| Shrimp cocktail | Chicken wings | Deep-fried vegetables |
| Deep-fried vegetables | Clams/oysters | Shrimp cocktail |
| Breaded mushrooms | Hot cheese appetizers | Breaded mushrooms |
| Hot cheese appetizers | Breaded mushrooms | Breaded zucchini |
| Potato skins | Salsa | Hot-cheese appetizers |
| Clams/oysters | Potato skins | Potato skins |

Source: 1987 Menu Census. ©1987 *Restaurants & Institutions*, a Cahners publication

**Melon showed the greatest growth as a good seller on appetizer menus.**

# &RESTAURANTS INSTITUTIONS

## BAR APPETIZERS TAKE OFF ON A WING

**Chicken wings, this year's appetizer growth leader, are especially popular in hotels and full-service restaurants with bars, and especially in the Northeastern states. The complete appetizer, chicken wings combine ease of preparation and presentation with a versatile attraction to many seasonings and attractive food cost.**

# 1987 MENU CENSUS

■ SOUPS

## Soupy Sales on the Rise

### Soups meet customer demand for small, satisfying meals.

Soup of the day, beautiful soup! Traditional or trendy, made from scratch stock or from a frozen concentrate, soups are growing in popularity on nearly every menu in the industry.

One of the surprises in this year's Menu Census is the number of fast-food operations serving soup. More than one-third of the fast-food operators polled this year sell chicken soup or chili. One out of four lists beef soup, bean soup, split pea or cream of broccoli on its menu board. Of those fast-food operators offering them, 89% list vegetable soup as a good seller; 87%, chicken; 85%, New England clam chowder.

The popularity of cream of broccoli soup shows no sign of slowing down. It once again takes the honors as growth leader in the soup category of this year's Menu Census. Runners-up are beef soup and vegetable soup. Among those listed as good sellers, this year's growth leader is beef soup, followed by cream of broccoli, vegetable, potato, cheese and seafood soups.

**Chowder wars:** New England clam chowder sells better than Manhattan-style throughout the nation. Calling them good sellers, respectively, are 81% and 66% of respondents overall. Both chowder styles sell better on the coasts.

**Bean-town favorite:** Although 65% of *R&I* respondents in the Northeast say bean soups are good sellers, the down-home varieties do better, selling well for 71% of operators in the South.

**Comfort by the ladleful:** The workplace beats out even the hospital in stressfulness, judging by the number of chicken soup orders in both places: 97% of B&I respondents list chicken soup as a strong seller, compared with 94% of hospital operators. Similarly, operators report, travel-stressed hotel guests order chicken soup more often than the average customer. 89% of hotel operators list it as a good seller, compared with 86% of commercial operators overall.

**No contest in cafeterias:** Vegetable soup is the hottest seller in cafeterias this year (97% of respondents call it a good seller) and nothing else comes close. Cream of broccoli and chicken soup follow at a good distance, with 84% and 82% of respondents calling them good sellers.

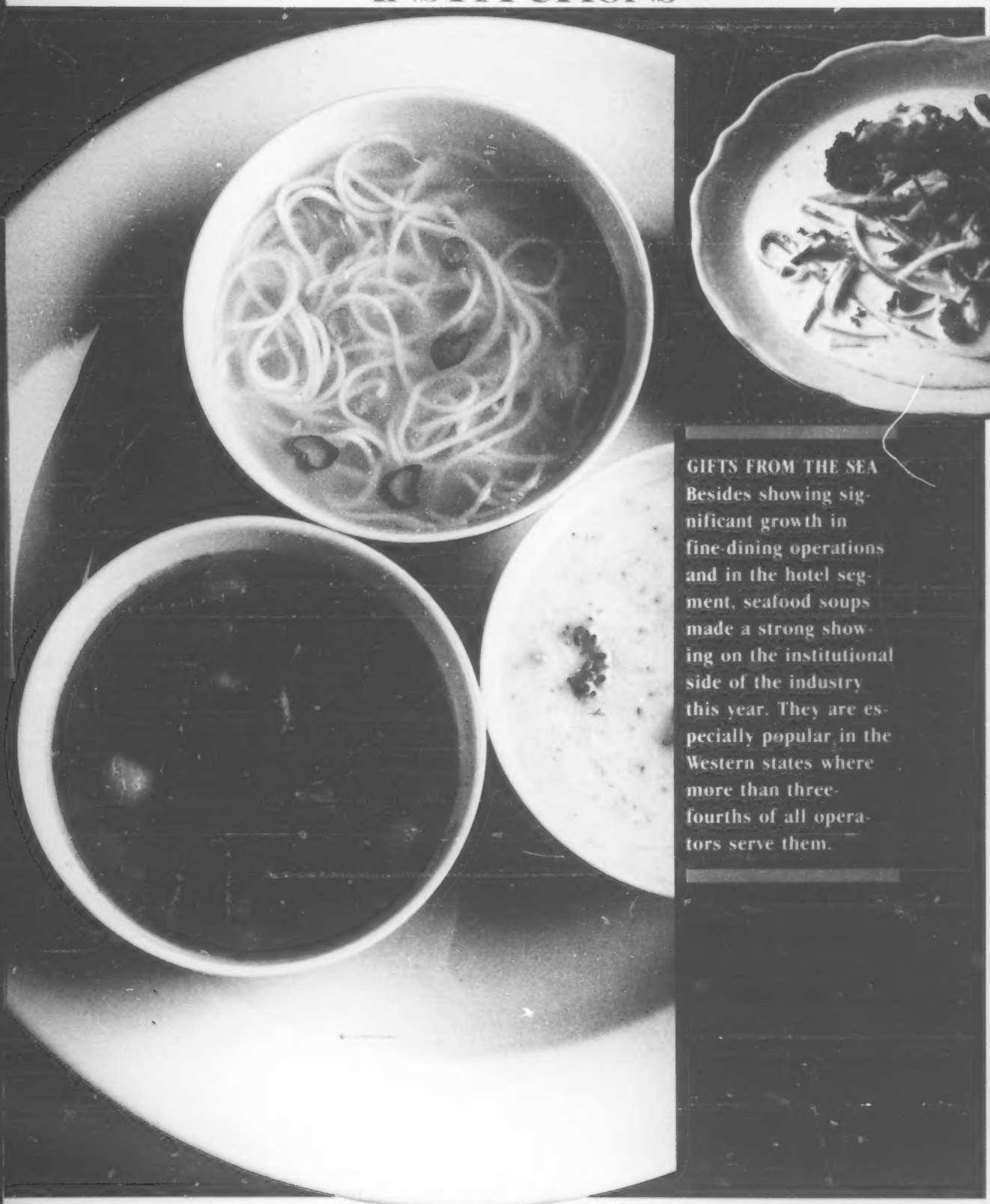
**Scratch soups cure the itch:** At the fine-dining end of the industry, the No. 1 soup is cream of broccoli (89% of respondents list it as a good seller). Following are New England and Manhattan clam chowders.

**10 BEST-SELLING SOUPS: CHICKEN, VEGETABLE TAKE HONORS**

Soup tends to be a comfort food, and the two soups most reminiscent of Mom's, chicken soup and vegetable soup, sell the best throughout the industry.

| Overall | Commercial | Institutional |
|---|---|---|
| Vegetable | Vegetable | Chicken |
| Chicken | Chicken | Vegetable |
| Beef | New England clam chowder | Beef |
| New England clam chowder | Cream of broccoli | Chili |
| Cream of broccoli | Beef | New England clam chowder |
| Chili | Cheese | Cream of broccoli |
| Cheese | Seafood | Minestrone |
| Potato | Chili | Cheese |
| Seafood | Potato | Potato |
| Minestrone | Manhattan clam chowder | Tomato |

Source: 1987 Menu Census. ©1987 *Restaurants & Institutions*, a Cahners publication.



**GIFTS FROM THE SEA** Besides showing significant growth in fine-dining operations and in the hotel segment, seafood soups made a strong showing on the institutional side of the industry this year. They are especially popular in the Western states where more than three-fourths of all operators serve them.

# 1987 MENU CENSUS

SIDE DISHES

## Potatoes Strong on the Side

### Green, yellow vegetables sell well, but pale next to potatoes' menu power.

Despite the cornucopia of fresh green vegetables available in this country, Americans remain devotees of potatoes, whether the spuds are mashed, fried or baked. Potatoes top the list of more than 50 side dishes given to operators to rate.

French fries and American fries, baked and mashed potatoes crowd the top of the overall, commercial and institutional best-seller lists.

But diners in this country occasionally are overcome with the urge to experiment. Baby vegetables, the darlings of new cuisine, have seen strong on-menu and good-seller growth during the past two years. Along with the babies, onion rings, cauliflower, stir-fried vegetables and egg noodles were added to the most menus; cauliflower, American fries, stir-fried vegetables and onion rings enjoyed the most growth as good sellers.

**Potatoes are king** in both full service and fast food. French fries, baked potatoes and American fries are the best-selling sides in full service; green beans, broccoli, asparagus, fettuccine and vermicelli, and egg noodles also sell well. Fast food's list of good-selling sides is predictably void of green vegetables, with onion rings, any kind of mushroom, french fries, American fries and potato chips grabbing the top spots.

**Although other side dishes** make a showing as good sellers on fine-dining menus, baked potatoes and French fries still rule. Fettuccine and vermicelli, broccoli, green beans, cauliflower, rice pilaf, asparagus and carrots round out the good-seller list in that segment.

**French fries get lost in the crowd** of green and yellow vegetables on cafeteria steam tables. Green beans, corn on and off the cob, cabbage, peas, cauliflower, carrots and mashed potatoes appear on most cafeteria menus.

**Business and industry customers** like potatoes, too, but green beans, broccoli and cauliflower are better sellers in corporate facilities than mashed or baked potatoes. Operators say corn in other forms than on the cob, carrots, egg noodles and white rice also sell well to company foodservice patrons.

**Most of the vegetables**, potatoes and starches appear on more menus in Northern and Eastern regions. The South and West, however, do have their favorites. Corn on the cob, dumplings, hush puppies, okra and white rice sell better in the South than anywhere else. Refried beans and Spanish rice do better out West than in other parts of the country.

**10 BEST-SELLING SIDE DISHES: FRENCH FRIES REMAIN NO. 1**

Operators say potatoes are better sellers than any of the 50 side dishes listed on the Menu Census. Green beans and broccoli also enjoy high good-seller status.

| Overall | Commercial | Institutional |
|---|---|---|
| French fries | French fries | French fries |
| American fries | Baked potatoes | Mashed potatoes |
| Baked potatoes | American fries | Corn (other) |
| Mashed potatoes | Broccoli | Green beans |
| Green beans | Green beans | Baked potatoes |
| Broccoli | Mashed potatoes | Broccoli |
| Hash browns | Onion rings | Onion rings |
| Onion rings | Mushrooms (any) | Corn on the cob |
| Corn (other) | Cauliflower | Stuffing |
| Fettuccine/vermicelli | Carrots | Applesauce |

Source: 1987 Menu Census. ©1987 *Restaurants & Institutions*, a Cahners publication

**THE LITTLE GIANTS**
Baby vegetables topped both the growth on menu and growth good seller lists, appearing on 11.1% more menus and selling well for 10.9% more operators. Where are they selling? In fine-dining operations, where 72% of the operators surveyed say baby vegetables sell well; in cafeterias, where 70% of the operators peg the vegetables as good sellers; and in hotels and motels, with 66.2% of the operators agreeing on the vegetables' selling power.

America loves french fries in almost any type of dining establishment.

# 1987 MENU CENSUS

■ SALADS

## Standards Spark Salad Sales

### Pasta salad, taco salad and tossed greens sell well in all segments.

According to the 1987 *Restaurants & Institutions* Menu Census, salads, especially old favorites, are selling better than ever, proving that "light and healthy" is more than a catchy media phrase.

Tossed green salad tops all lists, including overall, commercial and institutional best sellers. Tossed greens, pasta salad and potato salad have joined the most menus and have grown the most as "good sellers" since the census was last done in 1985. Coleslaw appears most frequently on menus in all industry segments while tossed greens rank high everywhere except in hospitals and nursing homes.

Tastes in salad dressings, however, veer away from tradition. Special house, buttermilk-based, blue cheese and Roquefort, Italian and Thousand Island are the best-selling salad dressings.

**Business and industry customers** choose tossed greens, chef's salad, fruit salad, cottage cheese and fruit, and pasta salad more often than other salads.

**Tossed green salad, an old favorite, again is the best seller overall.**

**Coleslaw, tossed greens,** fruit salad, chef's salad and potato salad proved best sellers on cafeteria lines.

**A comparison of good-selling** salads in full-service and fast-food operations proves that the two types of menus are beginning to meld. Full-service outlets, including fine dining, casual/theme, steakhouses and cafeterias peg tossed greens, special house salad, chef's salad, coleslaw and taco salad as good sellers. Hamburger, sandwich, pizza and chicken units, under the banner of fast food, said chef's salad, potato salad, tossed greens, coleslaw and macaroni salad sell well.

**WHERE HAS ALL THE PASTA GONE?**

Only tossed greens eclipsed pasta salad as the top on-menu and growth good seller. Pasta salad was added to 16.3% more menus, and was called a good seller by 14% more operators. Pasta salad remains popular in segments where customers want a quick, filling meal. College students are a prime example; 78% of the college foodservice operators say pasta salad is a good seller. Fast-food units come in next, with 69.7% saying pasta salad sells well.

**10 BEST-SELLING SALADS: TRADITIONAL TOSSED GREENS ANCHOR SALES**

Tossed green salad is the best-selling salad in all operations, in commercial operations and institutional facilities. Operators rated more than 20 salads.

| Overall | Commercial | Institutional |
|---|---|---|
| Tossed green | Tossed green | Tossed green |
| Special house salad | Special house salad | Fruit salad |
| Taco salad | Taco salad | Taco salad |
| Chef's salad | Chef's salad | Chef's salad |
| Fruit salad | Potato salad | Cottage cheese/fruit |
| Potato salad | Coleslaw | Potato salad |
| Coleslaw | Fruit salad | Pasta salad |
| Cottage cheese/fruit | Pasta salad | Gelatin salad |
| Spinach salad | Macaroni salad | Macaroni salad |
| Pasta salad | Cottage cheese/fruit | Mixed vegetable salad |

Source: 1987 Menu Census. ©1987 *Restaurants & Institutions*, a Cahners publication.

# 1987 MENU CENSUS

### CHEESEBURGER, PLEASE

**Hamburgers are a sure-fire seller in every segment of the foodservice industry, according to this year's census. They are most popular in schools, followed by hotels, fast food and hospitals.**

■ SANDWICHES

## Classics Still Reign

### Burgers take the top three slots as good-selling sandwiches.

Hamburgers and cheeseburgers remain the unrivaled favorite sandwiches in both commercial and institutional foodservice. Cheeseburgers are on top of the list, followed by hamburgers and the upscale version, gourmet hamburgers. Bacon cheeseburgers also appear on the top-seller list.

The classic sandwiches, the club sandwich and the bacon, lettuce and tomato, also continue to be as popular as ever. The business and industry segment most often has the club on its menu, followed closely by hotel and motel foodservice. Hotels and employee foodservice also are likely to put the BLT on the menu, as is college and university foodservice.

**The menu item that grew** most as a best seller this year was the croissant sandwich, followed by steak sandwich, fish patty sandwich, cheeseburger and bacon cheeseburger. The croissant sandwich appears most on hotel, college and business menus and sells best in hospitals.

**The chicken patty sandwich,** introduced by fast-food operations, has become a good-selling sandwich in institutional foodservice. Colleges, hospitals, schools and businesses all report high-selling status for the chicken patty. However, in the commercial sector, fast-food restaurants still most often proclaim the chicken patty a good seller.

**The cold deli sandwich grew most as a good seller in 1986.**

**Commercial operations' best-selling** sandwiches also include sliced turkey sandwiches, roast beef sandwiches, tuna salad sandwiches and thin-sliced steak sandwiches. Roast beef sells best in fast-food restaurants and least frequently in hotels.

**10 BEST-SELLING SANDWICHES: GROUND BEEF ON A BUN SELLS BEST**

The hamburger has been upgraded to gourmet status, and the chicken patty, created by fast-food operations, has been welcomed by institutional operators.

| Overall | Commercial | Institutional |
|---|---|---|
| Cheeseburger | Cheeseburger | Cheeseburger |
| Hamburger | Hamburger | Hamburger |
| Gourmet hamburger | Gourmet hamburger | Gourmet hamburger |
| Club sandwich | Club sandwich | Chicken patty |
| Bacon cheeseburger | Sliced turkey | Bacon, lettuce & tomato |
| Roast beef sandwich | Bacon cheeseburger | Ham and cheese |
| Chicken patty | Roast beef | Bacon cheeseburger |
| Bacon, lettuce & tomato | Tuna salad | Thin-sliced steak |
| Sliced turkey | Bacon, lettuce & tomato | Grilled cheese |
| Thin sliced steak | Thin-sliced steak | Roast beef |

Source: 1987 Menu Census. ©1987 *Restaurants & Institutions*, a Cahners publication.

# 1987 MENU CENSUS

■ MEAT

## Beef Makes a Clean Sweep

### Prime rib, steak and chili win best-selling spots.

Despite numerous media reports to the contrary, beef is alive and well on restaurant menus, according to the 1987 *Restaurants & Institutions* Menu Census. In the top 10 best-selling entree spots, beef makes almost a complete sweep. That old favorite prime rib is in the top slot this year, followed closely by steak.

Perhaps a result of the interest in hot, spicy food, chili also is a top contender this year, followed by equally spicy barbecued spare ribs. Comfort food entrees such as pot roast and meatballs also are winning the hearts of Americans, according to this year's census. Veal entrees also were cited as best sellers; veal Parmesan was a top seller overall, while veal chops appeared on the commercial segment best-seller list.

**Meatballs were the meat added** most frequently to menus this year, followed by baked ham, chili, liver and meat loaf. Meatballs were most popular in hospitals and nursing homes, colleges and in business and industry operations. Nearly all business and industry operators surveyed said baked ham appears on their menus, but it is more popular in the hospital and nursing home segment.

**Liver sells best** in the business and industry and full-service segments and is least popular in the college and university segment. Although meat loaf is a menu item frequently offered in institutional foodservice, it sells well only in the hospital and nursing home, and business and industry segments.

**Pork entrees were best sellers** in both the commercial and institutional segments. Roast pork sells well overall in commercial operations, while pork chops are popular in the institutional segments.

**Hotels and motels serve more** lamb chops, roast lamb, roast veal, meat and seafood combination plates, steak and prime rib than any other foodservice segment. Beef stew, meatballs, meat loaf, corned beef and Swiss steak are most often on business and industry menus. And corn dogs are big with the college and university crowd.

**Central region popular meat** entrees include chili, Swiss steak and corn dogs. Oriental steak teriyaki finds the most favor in the West, a region that has the least meat on the menu overall.

Other top 10 best sellers include London broil, Swiss steak and chopped steak.

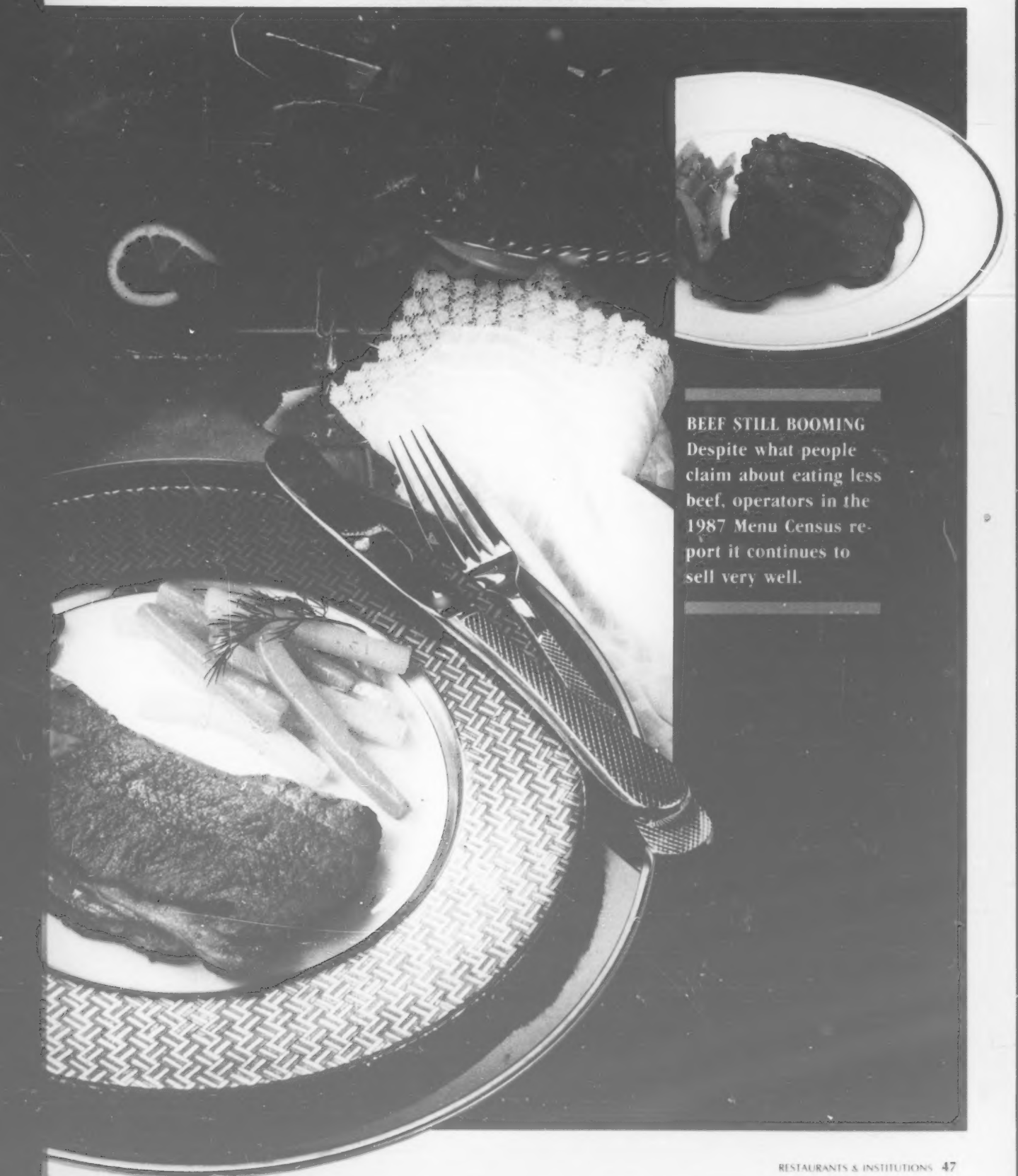
**Operators report more prime rib served than any other meat.**

**10 BEST-SELLING MEAT ENTREES: PRIME RIB IS PERENNIAL FAVORITE**

Among the top 10 best-selling meat entrees, beef dishes are mentioned more than any other type of meat. Veal and pork entrees also appear to sell well.

| Overall | Commercial | Institutional |
|---|---|---|
| Prime rib/roast beef | Prime rib/roast beef | Prime rib/roast beef |
| Steak | Steak | Pot roast |
| Chili | Chili | BBQ spare ribs |
| BBQ spare ribs | Veal chops | Steak |
| Veal Parmesan | Veal Parmesan | Chili |
| Chopped steak | BBQ spare ribs | Meatballs |
| Pot roast | Chopped steak | London broil |
| Meatballs | Roast pork | Veal Parmesan |
| London broil | Baked ham | Pork chops |
| Swiss steak | Meatballs | Chopped steak |

Source: 1987 Menu Census. ©1987 *Restaurants & Institutions*, a Cahners publication.



**BEEF STILL BOOMING**
Despite what people claim about eating less beef, operators in the 1987 Menu Census report it continues to sell very well.

# 1987 MENU CENSUS

■ **POULTRY ENTREES**

## Turkey Takes the Lead

### Roast turkey surges ahead of fried chicken as best-selling entree.

Turkey is not just for holidays any more, so say 1987 *Restaurants & Institutions* Menu Census respondents. For the first time, roast turkey beats out fried chicken as the best-selling poultry entree, although fried chicken comes in a close second. Turkey breast and turkey slices also appear in the top five best-seller list, proving that turkey has come a long way from the holiday table.

Despite the trend toward lowfat foods, fried chicken continues to be a good seller in all foodservice segments. Fried chicken is the No. 1 best seller in the institutional segment, where it sells especially well in hospitals and nursing homes.

**Easy-to-eat fast-food-inspired** chicken items such as chicken tenders, chicken nuggets and chicken patties have become overall poultry best sellers. In fact, the poultry item that has grown the most as a best seller is the chicken nugget, an item most often thought of as a fast-food offering. Institutional operations have grabbed onto chicken nuggets' popularity and are finding they sell very well, especially in schools and colleges.

**Specialty poultry items** such as chicken Kiev, turkey or chicken parmigiana, duck and rock Cornish game hens are most often on menus in the Northeast and in higher volume restaurants. Hotels and motels put the most duck and rock Cornish game hens on the menu.

**The business and industry** segment has more fried chicken, barbecued chicken, turkey breast and chicken or turkey salad on the menu than any other segment. Schools offer the most processed poultry items: turkey or chicken franks and turkey roll.

**Light and healthful** chicken or turkey salad, a top 10 best seller in commercial restaurants, is found most often in business and industry, and hospital and nursing home foodservice. Hospitals and nursing homes serve more barbecued chicken and chicken *cordon bleu* than any other foodservice segment.

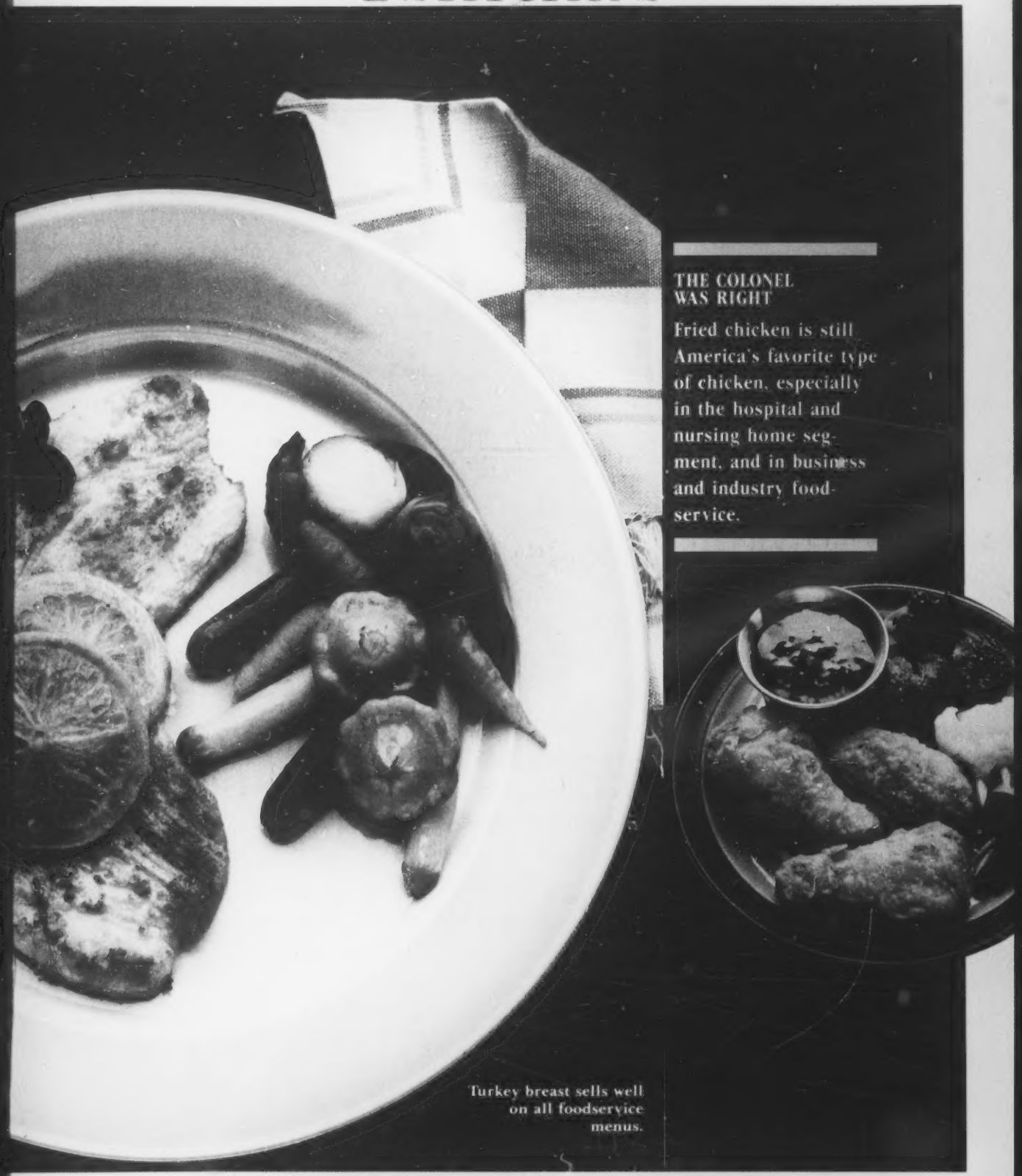
**Hot on the poultry trail is** the Northeastern region of the United States, which puts more poultry items on the menu than any other region. Chicken *cordon bleu* and chicken or turkey parmigiana, especially, are on a high percentage of menus in the Northeast. In the West, fried chicken and roast turkey are the best sellers, while in the South, traditional fried chicken and roast turkey still win kudos.

**10 BEST-SELLING POULTRY ENTREES: TURKEY BEATS OUT FRIED CHICKEN**

Turkey products have found an all-year-round place on foodservice menus alongside chicken entrees. Fast food influences institutional poultry offerings.

| Overall | Commercial | Institutional |
|---|---|---|
| Roast turkey | Roast turkey | Fried chicken |
| Fried chicken | Turkey breast | Roast turkey |
| Turkey breast | Fried chicken | Turkey breast |
| Chicken tenders | Pressure-fried chicken | Chicken tenders |
| Turkey slices | Chicken tenders | Chicken nuggets |
| Chicken with sauce | Chicken with sauce | Chicken patty |
| Chicken nuggets | Turkey slices | Turkey slices |
| Pressure-fried chicken | Chicken/turkey Parmesan | Chicken with sauce |
| Chicken patty | Roasted chicken | BBQ chicken |
| Roasted chicken | Chicken/turkey salad | Roasted chicken |

Source: 1987 Menu Census. ©1987 *Restaurants & Institutions*, a Cahners publication.



### THE COLONEL WAS RIGHT

Fried chicken is still America's favorite type of chicken, especially in the hospital and nursing home segment, and in business and industry foodservice.

Turkey breast sells well on all foodservice menus.

# 1987 MENU CENSUS

■ SEAFOOD ENTREES

## Shrimp Sells Everywhere

### Fried and non-fried shrimp dishes are good sellers in every segment.

Shrimp takes the top two spots on the 1987 *Restaurants & Institutions* Menu Census best-seller list. Both fried and non-fried shrimp were touted as best sellers overall, and appeared on both the commercial and institutional top 10 best-seller list.

Proving, however, that Americans are becoming seafood lovers, 12 out of the 32 seafood items tracked appeared on more than 20% of the menus of all operators surveyed. Fish species such as cod, tuna, salmon, flounder, haddock, sole, halibut and perch as well as scallops, clams, crab and shrimp are items operators increasingly chose to put on their menus. Seafood items that grew as best sellers in this year's census include cod, catfish, king crab and salmon.

**The Cajun craze is alive and well.** The top best-selling seafood item in the commercial segment is redfish, a species rarely used 10 years ago. Mild-flavored fish such as flounder, swordfish, cod, snapper, haddock and sole also are best sellers in the commercial segment.

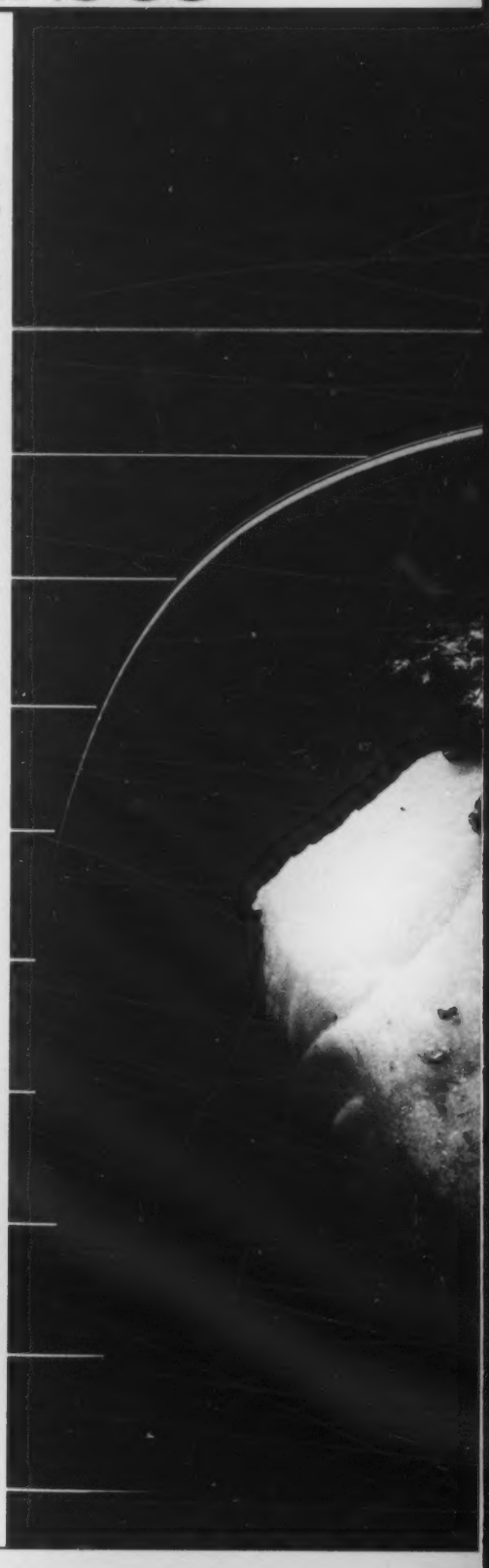
**The hotel and motel segment** puts more fish on the menu than any other segment, with shrimp, salmon and crab most likely to appear on the menu. Fast-food operations sell the least amount of seafood overall (excluding fish sandwiches), but french-fried shrimp and cod are the items that appear on fast-food menus most often.

**Institutional operators named** scrod, scallops and tuna in addition to the potpourri seafood platter as top-selling items. Schools serve the least amount of seafood in the institutional segment, but, not surprisingly, sell more fish portions and fish sticks than any other foodservice segment. Business and industry foodservice put a fair amount of seafood on the menu, citing cod, shrimp and tuna as top items.

**Regional differences are very strong** when it comes to types of seafood served. Coastal areas of the Northeast and West have more seafood items on the menu than the more inland areas in the Central and Southern regions.

**Northeastern operators most often have** tuna, scallops, clams, flounder, haddock, scrod, Seafood Newburg and lobster on the menu. Halibut, trout and snapper appear most on Western menus. Southern operators are most likely to have catfish on the menu.

**Less accepted seafood items** such as squid, mussels, monkfish, pollack and oysters are put on the menu most often in hotels and motels.



**10 BEST-SELLING SEAFOOD ENTREES: SHRIMP IS TOP SELLER OVERALL**

Firm-fleshed, mild-flavored seafood such as flounder, cod, swordfish and haddock scores the best with patrons throughout the foodservice industry.

| Overall | Commercial | Institutional |
|---|---|---|
| French-fried shrimp | Redfish/orange roughy | French-fried shrimp |
| Shrimp, non-fried | French-fried shrimp | Seafood platter |
| Seafood platter | Seafood platter | Scrod |
| Flounder | Flounder | Haddock |
| Cod | Swordfish | Scallops |
| Redfish/orange roughy | Cod | Shrimp, non-fried |
| Haddock | Shrimp, non-fried | Flounder |
| Scrod | Snapper | Cod |
| Swordfish | Haddock | Sole |
| Sole | Sole | Tuna |

Source: 1987 Menu Census. ©1987 *Restaurants & Institutions*, a Cahners publication.

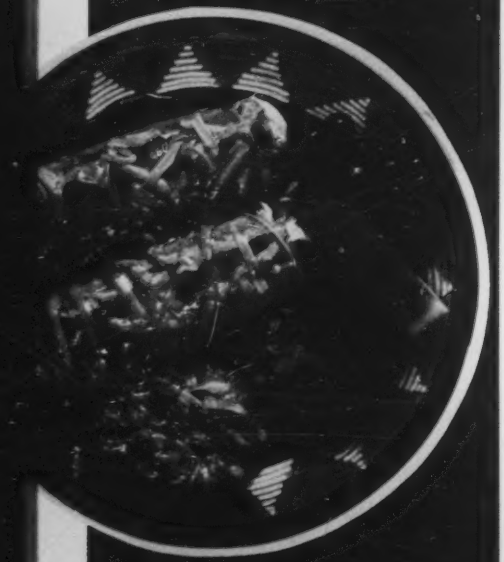
**SHRIMP IS FLYING HIGH**

Sales of both fried and non-fried shrimp soared in the past year, especially in the college and university segment, according to the 1987 *R&I* Menu Census.

Mild-flavored cod grew in popularity, according to this year's census.

# 1987 MENU CENSUS

**GRINGOS LIKE IT, TOO** Mexican entrees such as enchiladas, tacos and burritos are finding widespread appeal, according to the 1987 Menu Census, especially in the West.



■ **OTHER ENTREES**

## Tacos Tip the Scale

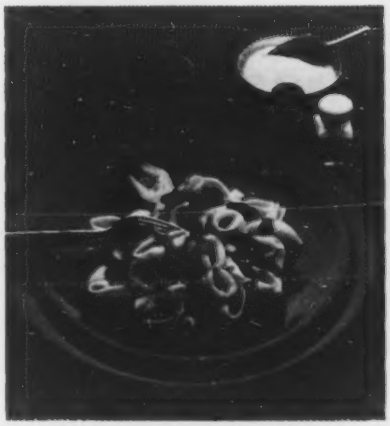
### Mexican, Italian entrees vie for good-seller status.

They might have started out as entrees specific to certain ethnic groups, but Mexican and Italian dishes have become all-American favorites. Operators surveyed named Mexican-origin tacos as the top seller in the other entrees category. The next five in the top 10 list are Italian-inspired: pasta and spaghetti with sauce, pizza, spaghetti with meatballs and lasagna.

**Pasta with sauce** is especially popular in the commercial segment, where it beats out its rival tacos. Although very few fast-food outlets offer pasta and spaghetti entrees, those that do find them especially good sellers.

**Mexican entrees are finding** widespread appeal, especially in the institutional sector. Tacos are big at colleges and in schools, while burritos and tostadas are popular in hospital and nursing home foodservice. Enchiladas sell well in full-service restaurants and in hospitals.

**Baked potatoes with toppings,** which have only been considered an entree for a short time, now sell well enough to earn best-seller status and, in fact, have grown as a good seller. Colleges and universities put baked potato entrees on the menu most often.



**Pasta salad grew as a good seller on foodservice menus.**

**To win a student's heart,** all school foodservice operators need do is serve them pizza. According to this year's survey, almost 99% of operators surveyed said that pizza sold well. Pizza also sells well at colleges, in fast-food units and in business and industry.

**Pasta salad,** an entree that is found most often on hotel and motel menus and in college and university, and business and industry foodservice, was the menu item that was added by the most operators. Fast-food operations most often call pasta salad a good seller, although it also sells well in hospitals.

**10 BEST-SELLING ENTREES: TACOS AND PASTA VIE FOR TOP SPOT**

Both commercial and institutional operations claim Mexican and Italian entrees such as tacos, pastas, enchiladas, pizza and tostadas sell well.

| Overall | Commercial | Institutional |
|---|---|---|
| Tacos | Pasta with sauce | Spaghetti with sauce |
| Pasta with sauce | Tacos | Tacos |
| Spaghetti with sauce | Spaghetti with meatballs | Pizza |
| Pizza | Spaghetti with sauce | Spaghetti with meatballs |
| Spaghetti with meatballs | Enchiladas | Pasta with sauce |
| Lasagna | Lasagna | Lasagna |
| Baked potato w/ topping | Baked potato w/ topping | Baked potato w/ topping |
| Macaroni and cheese | Pizza | Macaroni and cheese |
| Tostada | Tostada | Tostada |
| Enchiladas | Entree salads | Burritos |

Source: 1987 Menu Census. ©1987 *Restaurants & Institutions*, a Cahners publication.

# 1987 MENU CENSUS

■ DESSERTS

## Sweet Music: Dessert Is In

### Chocolate cheesecake: a rising star among classics.

Here's the scoop: Americans continue to eat more desserts. With the trend toward nutritious and healthful eating, consumers feel better about themselves and find more excuses to satisfy their sweet tooth.

Whether the treat is gooey, creamy, chewy, baked or frozen, dessert consumption has jumped 18% since 1978, according to MRCA Information Services.

This year's *Restaurants & Institutions* Menu Census shows that classic dessert items still are tops with consumers in all segments of foodservice, while new gourmet items are making inroads.

**While good old-fashioned** apple pie remains the top overall "good seller," chocolate cheesecake has shown the greatest growth as a good seller between 1985 and 1987. During the same period, chocolate cheesecake has been added to more dessert menus than any other item. It is selling especially well in contracted, hotel and motel, and fine-dining operations. Among fast-food operations, sandwich shops are, by far, selling the most chocolate cheesecake. Regionally, the Northeast is having the best success.

**In the pie group,** lemon, custard and chocolate have shown the greatest growth between 1985 and 1987. These pies have lips smacking more in the hospital and nursing home segment than any other institutional setting.

**Americans' love for chocolate** is still a very sweet affair when it comes to cakes. Plain, delicious chocolate cake remains the top good seller of all desserts in the institutional sector, especially in the college and university setting. In the commercial environment, it is doing great business in the hotel and motel segment.

**Ice cream remains** a steady performer, be it soft-serve, plain, gourmet or sundaes. Plain ice cream scores heavily in contract operations with strong growth in hospitals and nursing homes. Soft-serve ice cream is a big hit with fast-food hamburger operations, more so in the Central region than any other area. Sundaes are doing big business in family restaurants and at colleges. Trendy gourmet ice creams are making more of an impact each year. Growth has been highest in fine-dining establishments and on college campuses. Again, the Northeast region is outperforming other sections of the country.

**The healthful ice cream alternative,** yogurt, is finding a strong customer base in the business and industry sector, and again, on college campuses.

Other strong dessert performers are fresh fruit, cookies and brownies.

**10 BEST-SELLING DESSERTS: CLASSICS ARE STILL FAVORITES**

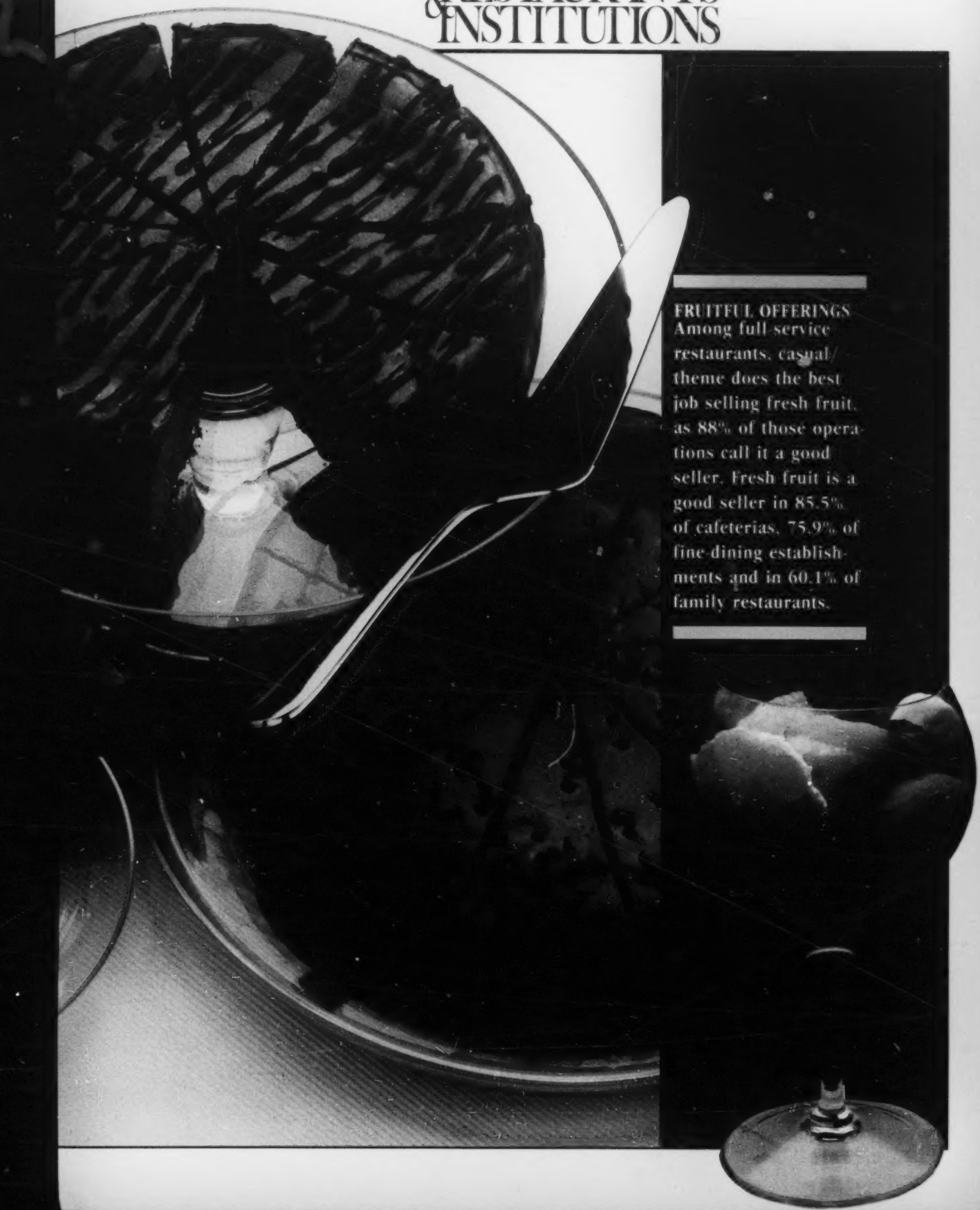
Throughout American history, dessert lovers have favored apple pie. This year is no exception. Chocolates also dominate the list.

| Overall | Commercial | Institutional |
|---|---|---|
| Apple pie | Apple pie | Cookies |
| Cookies | Cream-style cheesecake | Brownies |
| Chocolate cake | New York-style cheesecake | Chocolate cake |
| Cream-style cheesecake | Soft-serve ice cream | Apple pie |
| Soft-serve ice cream | Chocolate pie | Soft-serve ice cream |
| New York-style cheesecake | Chocolate cake | Cream-style cheesecake |
| Chocolate pie | Any berry pie | Chocolate pie |
| Brownies | Gourmet ice cream | Sundaes |
| Fresh fruit | Fresh fruit | Fresh fruit |
| Plain ice cream | Plain ice cream | Plain ice cream |

Source: 1987 Menu Census. ©1987 *Restaurants & Institutions*, a Cahners publication.

**Chocolate cheesecake is showing the strongest growth.**

# RESTAURANTS & INSTITUTIONS



**FRUITFUL OFFERINGS** Among full-service restaurants, casual/theme does the best job selling fresh fruit, as 88% of those operations call it a good seller. Fresh fruit is a good seller in 85.5% of cafeterias, 75.9% of fine-dining establishments and in 60.1% of family restaurants.

# 1987 MENU CENSUS

### THE METHOD BEHIND THE CENSUS

The 1987 Menu Census marks the 17th year *Restaurants & Institutions* has conducted this comprehensive survey of foodservice operators. Two versions of the surveys were mailed to approximately 12,000 operators this year, 6,000 for each version.

Version A asked operators to check which food items listed on the survey are featured on their menu, and which of those are good sellers. Version B asked respondents to indicate at which meal occasions each food item listed on the survey is served in their restaurant. Only the results of the Version A survey are used in this article because it is the same version used in years' past, allowing tracking of menu trends.

Survey respondents, both in terms of geographical location and type of operation, represent a complete industry cross-section. Commercial subcategories include full-service restaurants, fast-food units and, hotel and motel restaurants. The institutional sector breaks down into hospitals and nursing homes, colleges and universities, schools, and business and industry accounts. Regionally, the survey is divided into four sections: Northeast, Central, South and West.

■ BEVERAGES

## Colas Guzzling Up Market

### Milkshakes and malts make big splash as good sellers.

When you consider that per capita consumption of soft drinks stands at 47.4 gallons annually, it is no surprise that cola-flavored soft drinks continue to be the overall "good seller" leader among beverages in the 1987 *Restaurants & Institutions* Menu Census.

Sales at family restaurants, from fast food to steakhouses, account for cola's strong performance.

To no one's surprise, coffee also is a perennial strong performer in the *R&I* Menu Census. Contractors, especially in the business and industry segment, play a big role in coffee's success.

**Juices are showing steady growth** as good sellers, especially apple, orange and cranberry. Orange juice is showing strength across the industry, but cranberry and apple are showing the strongest growth on menus. Hotel and motel operations on the commercial side and business and industry feeders on the institutional side are the overall "good seller" leaders for cranberry and apple juices.

**Just as Americans are indulging** in desserts, they also are showing their affinity for milkshakes. Malts and milkshakes are atop this year's survey as the beverages showing the greatest gain as good sellers. Naturally, they are performing well in fast-food operations and school settings, but they are showing vast improvement in the family and casual/theme environment.

**Beer and wine** continue to be strong performers in the commercial segment, specifically in the West region where wine coolers are showing exceptional growth. Beer and wine also are showing marked improvement in the contract catering segment.

**Fruit juices, decaffeinated coffee and milkshakes show strong sales growth.**

**10 BEST-SELLING BEVERAGES: CONSUMERS CRAZED BY COLA**

Cola remains the preference of consumers across the board. Nearly 95% of commercial operations report cola as a good seller.

| Overall | Commercial | Institutional |
|---|---|---|
| Cola soft drinks | Cola soft drinks | Orange juice |
| Orange juice | Regular beer | Cola soft drinks |
| Regular beer | White wine | Coffee |
| Coffee | Coffee | Whole white milk |
| White wine | Iced tea | Apple juice |
| Any liquor/spirit | Any liquor/spirit | Lowfat milk |
| Light beer | Orange juice | Grape juice |
| Iced tea | Light beer | Chocolate milk |
| Whole white milk | Milkshakes/malts | Iced tea |
| Milkshakes/malts | Imported beer | Decaffeinated coffee |

Source: 1987 Menu Census. ©1987 *Restaurants & Institutions*, a Cahners publication.

The newly organized Halloran House management staff.

■ HUMAN RESOURCES

# Halloran House Wins with Caring Attitude

## Division managers motivated by hospitality workshop series.

Setting higher employee standards. Practicing motivational techniques. Encouraging teamwork. These management principles all sound great, but are they worth the effort? Will they really make a difference on the bottom line?

The answer has been a resounding yes at the Halloran House hotel in New York City, on Lexington Avenue between 48th and 49th streets. The top line: guest satisafaction. The bottom line: a financial turnaround.

For the first eight months of 1985, the hotel lost $3.5 million in a very competitive corporate market (neighbors include the Inter-Continental, the Doral Inn, the Loews Summit and the Waldorf-Astoria). In 1986, for the same eight months, the hotel lost only $250,000. In 1985, the first eight month's operating profit was 26%. For the same period in 1986, profit increased to 32% simply because sales increased and expenses were reduced. The turnaround is attributed to a staff that cares more, is more careful and shows more pride. Because of better service, the hotel was able to increase room rates from $87 to $102 a night.

Halloran House General Manager Domenic D'Angelo recently enrolled his division managers, their assistants and department heads in a series of workshops under the direction of prominent educator Dr. Eugene Forence. Forence is the president of Hospitality Learning Systems Inc. in Weston, Conn.

D'Angelo explains, "Our purpose in exposing the Halloran House staff to the 'Hospitality Learning System' workshop program was to equip each staff member with the important tools to do a better job. A carpenter couldn't function without a hammer; a painter without a brush. Same for hotel people. If you want a happy, satisfied clientele, you must supply your staff with the tools to help them reach that goal.

"Before you get to this point, though," D'Angelo continues, "you have to make sure your people—after they've mastered the tools they've been given—work together as a team to develop a set of 'Guideline Management Principles.' These act as a blueprint or roadmap in helping each of us, including the general manager, reach our individual and organizational goals."

Forence began the program by surveying the hotel to see what it needed to improve its service system. At the time, the hotel had a lot of new department heads. They needed to learn teamwork and to work as a group to come up with standards to measure performance.

First, each department head and a representative from the line employees had to determine if a standard was feasible and if it was important. The workshop resulted in standards set much higher than if D'Angelo would have set them himself.

The food and beverage team decided that timeliness was an important factor in a guest's decision whether to make a return trip to the hotel. The group decided that guests should receive a menu no longer than one minute after being seated, and that orders should be taken no more than five minutes later.

Bottom line results: Food and beverage sales increased from $5.2 million in 1985 to $6.6 million in 1986.

*—Jeff Weinstein*

■ R&I DATA

### LABOR COST INDEX: MARKET IS TIGHT FOR COMMERCIAL MANAGERS

In all segments of commerical operations, survey respondents report a below-average need for managerial hires. The hotel and motel segment reports the lowest need; full service has the most openings.

| | Northeast | North Central | Southwest | West | Average commercial | Average institutional |
|---|---|---|---|---|---|---|
| Executive chef* | $28,550 | $27,536 | $30,535 | $27,669 | $30,693 | $26,325 |
| Manager* | 21,141 | 17,864 | 18,714 | 20,148 | 19,998 | 18,915 |
| Asst. manager* | 18,406 | 14,686 | 17,649 | 17,413 | 16,876 | 18,035 |
| Mgmt. trainee* | 14,313 | 12,623 | 14,351 | 15,333 | 13,962 | 14,921 |
| Cook** | 249 | 211 | 202 | 231 | 218 | 228 |
| Dishwasher** | 167 | 156 | 148 | 164 | 151 | 167 |

Key: *annually **weekly

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